

TO: Distribution
FROM: Market Information / Bruce Neidle
SUBJECT: Nielsen Monthly Analysis - April 1996

DATE: May 31, 1996

PM was the only manufacturer to post a month-to-month share gain in April, up +0.8 points to a record high of 49.9%. Marlboro also established a record monthly share level of 33.7%, up +0.9 points versus March. Performance likely benefited from continued implementation of the Marlboro/Basic Spring Special promotional program, consisting of money-off deals and two-pack side-by-side promotional sleeves. Newport was the only competitive premium product to post a share gain of at least +0.05 points this month. Promotional activities among the major competitive premium franchises were generally flat to declining this month.

The Discount category declined -0.4 points to 26.5%. Among the discount brands, Basic posted the largest month-to-month gain while Cambridge, GPC and RJR Private Labels experienced the largest losses.

- PM's monthly share increased +0.8 points versus month-ago to a record high of 49.9%, with Marlboro and Basic accounting for a majority of the gain.
 - PM's share of the Premium category expanded +0.9 points to 57.9%, corresponding with Marlboro's gain and relatively stable competitive promotional activities at retail.
- Marlboro's retail share advanced +0.9 points versus March, establishing a record monthly high of 33.7%. Performance likely benefited from promotional activities associated with the MBSS program.
- PM OPB remained relatively stable this month at 8.9%.
- Basic's share of industry advanced +0.1 point versus last month to 4.8% (its highest monthly share level since August 1993), likely influenced by MBSS, other promotional programs (including B2G1F deals) and Basic Box expansion. Basic's share of category increased +0.5 points to 17.9% (its highest share of category to date).
- The Discount category declined -0.4 points to 26.5% (its lowest level since February, 1992), with Cambridge, GPC and RJR PL accounting for a majority of the loss.
- Among the major competitive premium brands, Newport posted the largest month-to-month share gain (+0.1 point) to a record high of 4.8%, while all other competitive premium franchises were relatively flat to declining.

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Nielsen Topline Report - April 1996

May 31, 1996

Distribution:

R. Anise	J. Gilbert	K. McEncroe	S. Rush
M. Anton	H. Glastein	T. McGovern	T. Saloun
S. Apple	A. Goldfarb	E. Merlo	M. Salzman
M. Arwady	M. Gordon	R. Mikulay	E. Schneiderman
M. Bain	R. Gordon	D. Milby	M. Schroeder
T. Beane	J. Greene	H. Millington	B. Schuyler
D. Beran	H. Harwood	M. Moore	A. Schwartz
G. Bible	M. Hillis	R.W. Moore	B. Seto
B. Bittner	D. Himmel	J. Moose	B. Shah
S. Bloom	B. Hopkins -R3	J. Morgan	R. Simons
G. Blumenson	K. Houghton	J. Mortenson - R5	A. Sinha
J. Bonhomme	A. Hyland	J. Mullen-Sampson	M. Slone
B. Case	J. Isaacs	M. Murphy	W. Smith
J. Chaump	S. Jannetta	B. Neidle	H. Steele
J. Clary (R2)	C. Johnson	D. Nelson - R1	R. Stroud
D. Cohen	E. Joyce	J. Nelson	M. Suter
K. Compton	D. Keane	S. Norris	N. Suter
N. Conrad	J. Keighley	B. O'Brien	M. Szymanczyk
D. Dangoor	T. Keim	S. O'Brien	L. Thearnan
J. de Castro	F. Kelly	S. Opengart	J. Thomas
D. Devitre	T. Lauinger	A. Padoan	J. Tiesi
P. Dodd	K. Leger	P. Paoli	C. Tucker
J. Dwyer	S. LeVan	P. Piscitelli	J. Turner
N. Ellis	C. Levy	S. Piskor	P. Volz - LB
C. Enger	A. Lewis	M. Platteter	A. von Germeten
G. Fawcett	B. Lewis	D. Potter	M. Waldman
P. Fernandez	J. Lichtman	S. Rafferty	R. Webster
B. Ferrin	H. Long	S. Reich	R. Weiner
S. Fuller	G. Ludlow	T. Resman	B. Weinstein
L. Funness	N. Lund	B. Reuter	D. Werth
T. Garguilo	M. Maggio	V. Robins	L. Wexler
E. Gawronski	M. Mahan	D. Rubin	R. Whalen
E. Gee	W. Marin		H. Willard - R5
	P. McCarthy		M. Wood
			T. Young

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